

INFORMAL PROBATE

4

Closing the Estate as Personal Representative (Forms Packet)

©SUPERIOR COURT OF ARIZONA IN MARICOPA COUNTY

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PBIP8fc – 5276



SELF SERVICE CENTER

INFORMAL PROBATE PART 4: CLOSING THE ESTATE

How to assemble these documents: This packet contains court forms to close the estate, whether there was a will or not. Be sure the documents are in the following order:

Order	File Number	Title	No. Pp.
1	PBIP8ft	Table of forms in this packet	1
2	PBIP8k	Checklist for Closing the Estate	1
3	PBIP87f	<i>“Closing Statement and Proof of Mailing Closing Statement”</i>	2

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SELF-SERVICE CENTER

INFORMAL PROBATE

CLOSING THE ESTATE OF THE PERSON WHO DIED

CHECKLIST

Use the forms and instructions in this packet only if the following factors apply to your situation:

- ✓ You have been appointed the personal representative of the estate of a person who died; AND,
- ✓ The person had a will or did not have a will; AND,
- ✓ You have filed the final Accounting and Deed of Distribution; AND,
- ✓ You want to close the estate and close the court case: AND,
- ✓ At least 4 months have passed since you were appointed Personal Representative, and at least 4 months have passed since the date of the first publication to the Notice to Creditors.

READ ME: It is very important for you to know that when you sign a court document, you may be helping or hurting your court case. Before you sign any court document, or get involved with a court case, it is important that you see a lawyer to make sure you are doing the right thing. The Self-Service Center has a list of lawyers who can give you legal advice and can help you on a task-by-task basis for a fee. If you want to know more about our list of lawyers and our list of mediators, ask the Self-Service Center staff.

Your Name: _____
 Your Address: _____
 Your City, State and Zip Code: _____
 Your Telephone Number: _____
 Personal Representative: _____

SUPERIOR COURT OF ARIZONA MARICOPA COUNTY

In the Matter of the Estate of:

Case Number PB _____

 (Name of the person who died)

CLOSING STATEMENT and PROOF OF MAILING/DELIVERY CLOSING STATEMENT

I am the Personal Representative of this Estate, and I make these statements under oath.

1. **Appointment as Personal Representative.** I was appointed as the Personal Representative of this Estate on _____ (date), more than four months before the date of this Closing Statement.
2. **Notice to Creditors.** The Notice to Creditors was published according to law. The first publication occurred on _____ (date), more than four months before the date of this Closing Statement.
3. **Administration of Estate.** The Estate has been fully administered by making payment, settlement or other disposition of all expenses of administration, and all taxes and claims that have accrued against the Estate with the following exceptions: (List the exceptions.)

4. **Distribution of Assets.** I have distributed all of the assets of the Estate to the persons entitled to distribution.
5. **Mailing Closing Statement.** I am sending a copy of this Closing Statement to all of the people to whom I distributed property of this Estate, to all people whose interests are affected by the administration of the Estate, and to all creditors or other claimants whose claims against the Estate are not barred or were not paid.
6. **Accounting.** I have mailed or delivered a copy of the full written accounting of the Estate to the people whose interests are affected by the administration of the Estate, including guardians ad litem, conservators and guardians.
7. **Claims.** With respect to any claim listed above in paragraph 3 that has not been paid and that is not barred, I have distributed the Estate subject to possible liability, with the agreement of the

Case No. _____

distributees, or the following arrangements have been made to accommodate outstanding liabilities: (List arrangements.)

Signature of Personal Representative

STATE OF ARIZONA)
County of _____)ss.

I, being duly sworn, state that I am the Personal Representative for the above Estate, and that the statements in the Closing Statement are accurate and complete to the best of my knowledge and belief. I also state that a copy of this closing statement was mailed to the following individuals on the date(s) and at the address(es) below.

Signature of Personal Representative

This Closing Statement was subscribed and sworn to before me this _____ day of _____, _____, by the above named person.

My Commission Expires:

Signature of Notary Public

A copy of the Closing Statement
was mailed to the following individuals:

Name	Address	Date Mailed/Delivered
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____